Central Records System
USER GUIDE

Introduction

Our organisation captures hardcopy information via the Central Records System (CRS). This system is used to create hardcopy files, capture and respond to file requests, assign user access to record types (personnel files, legal files etc), track file locations (with people, at offsite storage, in University Archives etc), apply appropriate disposal authority and review dates to files and to search for University Information.

As a user you may have a need to use the system in order to locate files, request files or transfer files to other people within the University.

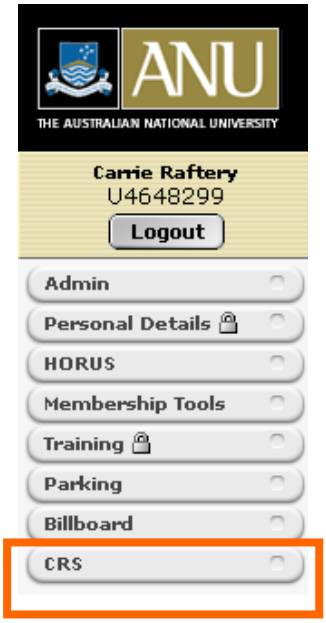
Getting Started

You will need to LOG in to CRS via ANUBIS, using your UNI ID & HORUS password.

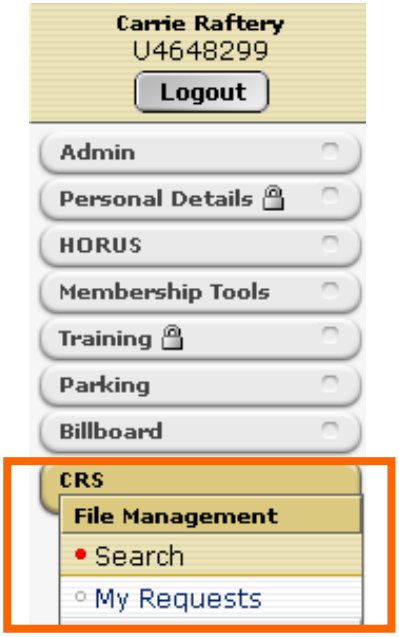
LOGGING IN

Login
University ID:
Password:
Login »
To help ensure the privacy of your information, be sure to logout and Exit/Quit /Close your browser at the end of your session.

Once you have logged into ANUBUS you will see the following MENU tree – the CRS application sits at the bottom of this list.



Click on the CRS link to display your options for Searching, Requesting and Transferring files. The following menu list will appear



TIP – If you cannot see the CRS link or click on it to enter the application, it is likely that you don't have access to the System and you will need to complete an Access Request Form (on the website) in order to access the information stored in the system

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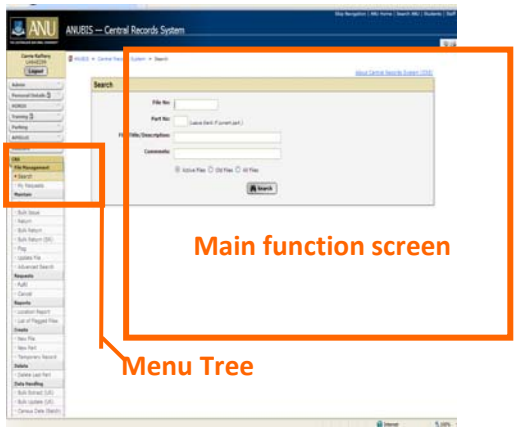
Navigating around the screens

As with most web applications you navigate CRS via a menu tree located on the left hand side of the screen. Once you highlight a function from this menu, the main function screen will contain the action fields necessary to perform that function



Understanding the icons

There are many different actions that can be performed in CRS such as: requesting a file, transferring files to other people and searching for information. For each of these actions you will see a variety of different icons. The following guide will tell you what the different icons mean.

1.

SEARCH – this icon when selected will begin the process of searching the system for the parameters entered

2.

REQUEST – this icon will appear next to a file and allows you to request the file to be issued to you.

3.

PROFILE – this icon will appear next to a file entry and allows you to open up the metadata profile of the FILE which displays the file details & borrower history

4.

TRANSFER – this icon will appear next to a file entry only when the file is currently issued to someone and will allow you to transfer the file into the custody of someone else

5.

EDIT – this icon allows you to edit and update any requests that you have made

6.

DELETE – this icon allows you to delete a request in the event that you've requested the wrong file or you no longer need it.

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Requesting a file

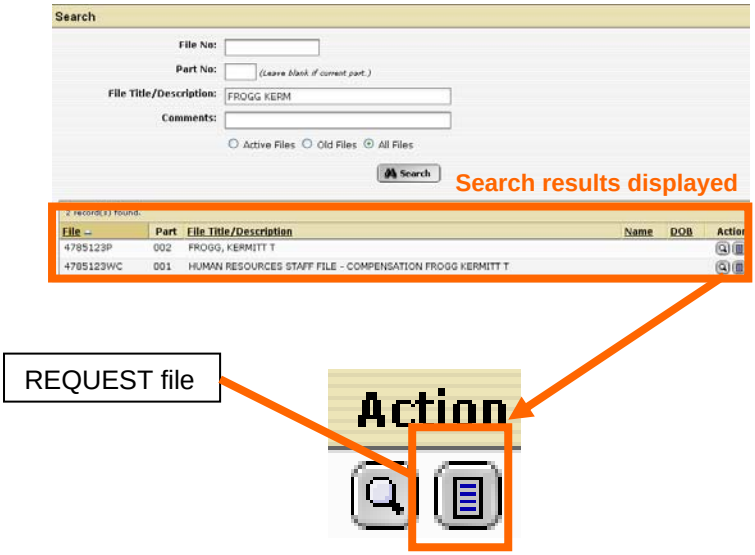
In order to have a file sent to you from the University's storage (onsite or offsite) you will need to place a request for the file online via CRS. This allows University Records to track and report on all requests made.

1 Requesting a file for YOURSELF

The majority of files that you request via CRS will be for yourself in order to perform your basic work functions.

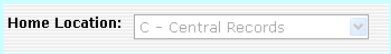
1 You will need to search for the file in order to request it (refer to SEARCHING)

2. Once the file is listed in the search results you can request it



Time Saver – If you are able to request a file – it is a good idea to check its location first, some files are located in Archives & you need to contact them directly, checking file location will save you time:

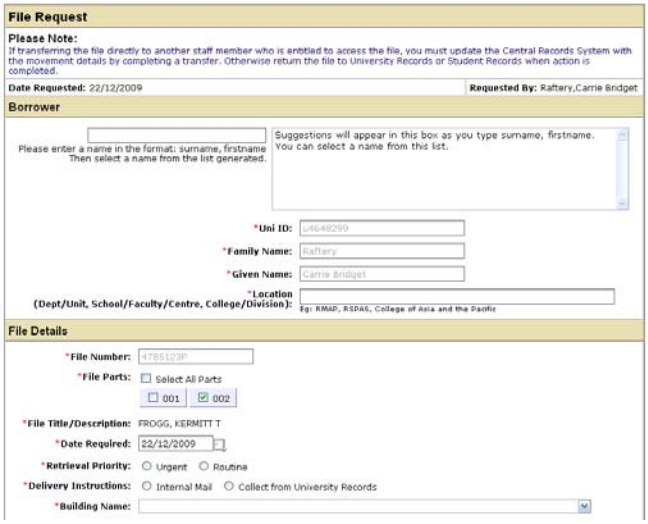
1. Click on the magnifying glass
2. Check the HOME LOCATION Field



3. If the location is:
   - **N – University Archives**

do not request the file – contact University Archives to arrange a time to view the file

3. Click on the REQUEST button underneath the ACTIONS menu alongside the file you wish to REQUEST. The following screen will appear:



4. In the BORROWER field TYPE your SURNAME – your full name & details should appear in the list on the right hand side – select your name from the list

Borrower
raft
Please enter a name in the format: surname, firstname
Then select a name from the list generated.
Raftery, Carrie Bridget (Central Records, Corporate Information Services)
Raftery, David Jonathon (Graduate School Scholarships, Graduate Schoo
Raftos, Peter William (Enterprise Systems, Corporate Information Servic
*Uni ID:
*Family Name:
*Given Name:
*Location
(Dept/Unit, School/Faculty/Centre, College/Division):
Central Records, Corporate Information Services

5. Fill in your LOCATION i.e. the division/department you work for.

TIP – Your location is usually the example underneath the field – you can HIGHLIGHT it and drag it into the LOCATION field.
The field is left blank in the instance that you are on secondment to somewhere else

6. Fill in the remaining file details –
Part Number (you can select a specific part or ALL parts)
DATE Required (it will default to today's date), you can change this if you wish for the file to be delivered at a date in the future (i.e. a weeks time)
Retrieval Priority (URGENT is usually within an hour, routine is same day or depends on the internal mail)
Delivery Instructions (if you select INTERNAL mail it will be assumed your request is not URGENT)

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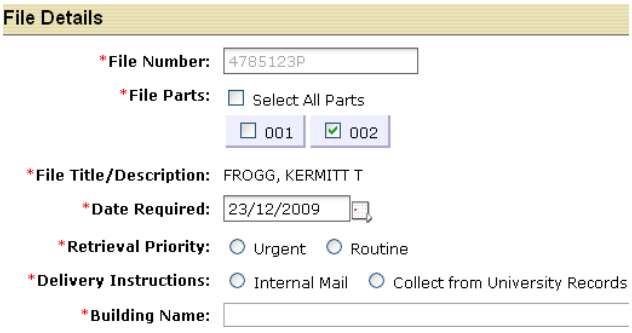
Building Number (this is so that we can ensure the file makes it to the correct location)

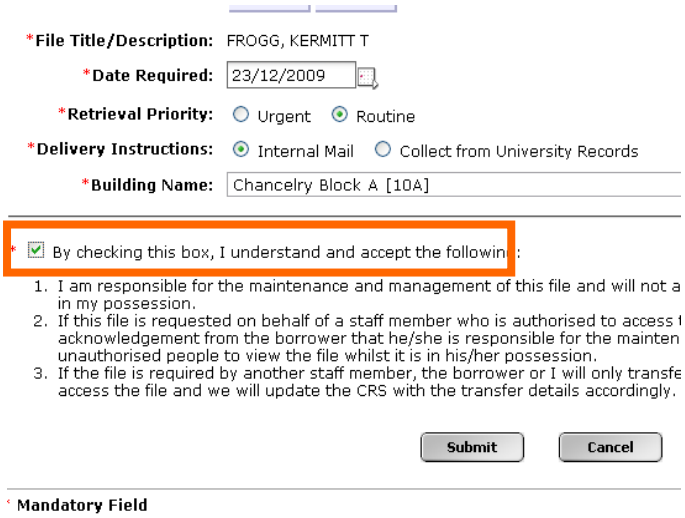


TIP – File details such as the TITLE & NUMBER will be automatically defaulted & cannot be changed.

7. Once you have completed the file details fields, you will need to read the RESPONSIBILITY statement which details your responsibilities as the main file holder in relation to PRIVACY, File access & File Maintenance.

8. Place a tick in the box once you have read and understand your responsibilities

TIP – You will not be able to request the file if you do not accept responsibility for it by placing a tick in the box.


*File Title/Description: FROGG, KERMITT T
*Date Required: 23/12/2009
*Retrieval Priority: Urgent Routine
*Delivery Instructions: Internal Mail Collect from University Records
*Building Name: Chancelry Block A [10A]
By checking this box, I understand and accept the followin
1. I am responsible for the maintenance and management of this file and will not a in my possession.
2. If this file is requested on behalf of a staff member who is authorised to access t acknowledgement from the borrower that he/she is responsible for the mainten unauthorised people to view the file whilst it is in his/her possession.
3. If the file is required by another staff member, the borrower or I will only transfe access the file and we will update the CRS with the transfer details accordingly.
Submit
Cancel
Mandatory Field

9. Click on SUBMIT to complete your request and send it to University Records

10. If your request was successful you will see the following message at the top of your screen

File Request successfully created.

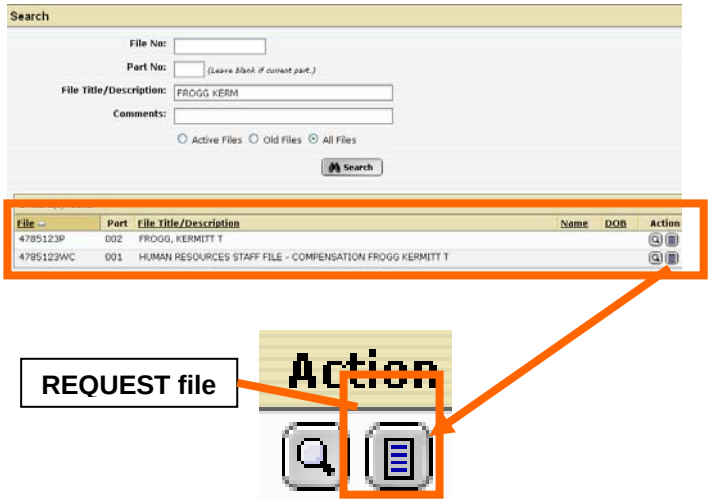
11. You will be able to monitor the progress of this request through your MY REQUEST function (2.3)

2 Requesting a file for SOMEONE ELSE

Occasionally you may have a need to request a file on behalf of someone else either because they don't have access to their computer or they are senior to you. CRS allows you to do so in order to ensure accurate file location information is maintained in the system and the right person has responsibility for the file.

1 You will need to search for the file in order to request it (refer to SEARCHING)

2. Once the file is listed in the search results you can request it



3. Click on the REQUEST button underneath the ACTIONS menu alongside the file you wish to REQUEST. The following screen will appear

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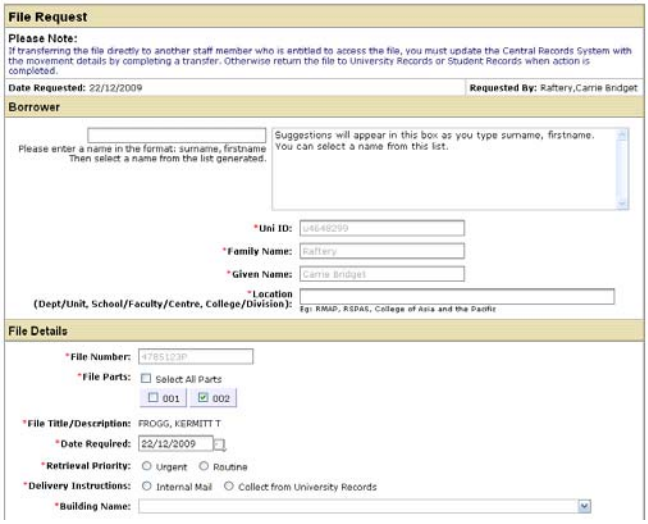

File Request
Please Note:
If transferring the file directly to another staff member who is entitled to access the file, you must update the Central Records System with the movement details by completing a transfer. Otherwise return the file to University Records or Student Records when action is completed.
Date Requested: 22/12/2009
Requested By: Raftery,Carrie Bridget
Borrower
Please enter a name in the format: surname, firstname Then select a name from the list generated.
Suggestions will appear in this box as you type surname, firstname. You can select a name from this list.
*Uni ID:
*Family Name: Raftery
*Given Name: Carrie Bridget
*Location (Dept/Unit, School/Faculty/Centre, College/Division):
Eg: RMAP, RSPAS, College of Asia and the Pacific
File Details
*File Number: 4785123P
*File Parts: Select All Parts
001
002
*File Title/Description: FROGG, KERMITT T
*Date Required: 22/12/2009
*Retrieval Priority: Urgent Routine
*Delivery Instructions: Internal Mail Collect from University Records
*Building Name:

4. In the BORROWER field TYPE the SURNAME of the person on behalf of whom you are requesting the file – Their full name & details should appear in the list on the right hand side – select their name from the list

5. Complete the File details

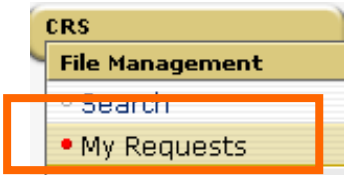
6. Read and tick the Responsibility Clause

7. Click on Submit to complete the request and send to University Records for action.

8. You will be able to monitor the progress of this request through your my REQUEST function

3 Monitoring a request via MY REQUEST

1 Select MY REQUEST from the menu tree on the left hand side of the screen

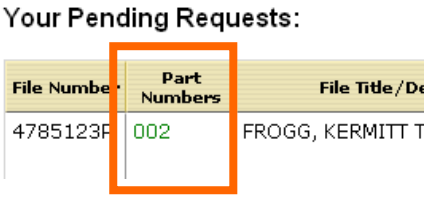


2. The screen is divided into two sections – your FULFILLED REQUESTS and your PENDING REQUESTS.

3. If you have just placed the request it will be sitting at the top of the PENDING REQUESTS section.

4. The file will be listed with the TITLE, File Number, the intended borrower and a colour coded part number

5. The colour of the PART number indicates the progress of the request



- **GREEN** indicates pending
- **BLUE** indicates completed/fulfilled in system
- **RED** indicates request cancelled

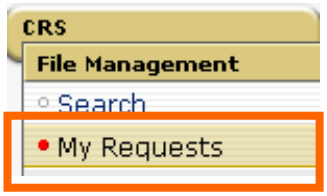
6. You can use this colour system to track when your request is either in the Internal Mail or ready for collection (whichever you have indicated in the request)

4 Editing a request via MY REQUEST

It is understood that we all make mistakes therefore CRS has the ability for you to edit a request in the event that you have made a mistake (i.e. with delivery instructions) or that there have been developments that require the request to be updated (someone else needs the file)

You can only edit a PENDING request.

1 Select MY REQUEST from the menu tree on the left hand side of the screen



2. The screen is divided into two sections – your FULFILLED REQUESTS and your PENDING REQUESTS.

3. If you have just placed the request it will be sitting at the top of the PENDING REQUESTS section.

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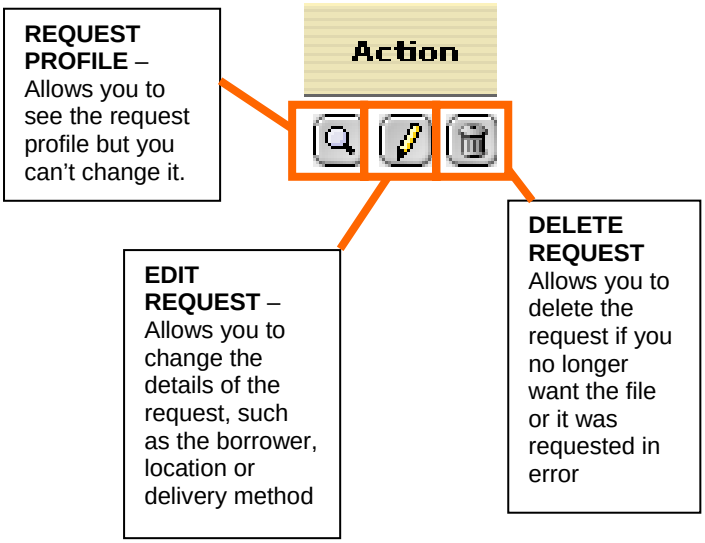
4. The file will be listed with its details (FILE NUMBER, TITLE) as well as the intended borrower. Underneath the ACTIONS column you will have the option to edit the REQUEST


Action
REQUEST PROFILE – Allows you to see the request profile but you can't change it.
EDIT REQUEST – Allows you to change the details of the request, such as the borrower, location or delivery method
DELETE REQUEST Allows you to delete the request if you no longer want the file or it was requested in error

5. Click on the EDIT button – the standard REQUEST screen will appear and you will have the option to change:

- Borrower details (if you wish to change who is to receive the file
- Date Required by
- Retrieval Priority
- Delivery Instructions
- Building Number (if the location is now different due to an updated borrower)

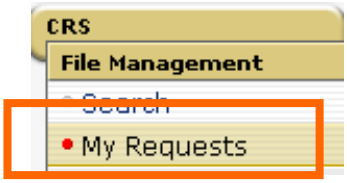
6. Edit the request to reflect your updates (i.e. in the instance of a different borrower)

7. Click on submit to complete the updates and send the changes to University Records

5 DELETING a request via MY REQUEST

You may need to delete a request in the instance that you have requested the wrong file or part, or that someone else has negotiated with you for the file therefore you will need to delete your request so that they can request it.
You can only DELETE a PENDING request.

1 Select MY REQUEST from the menu tree on the left hand side of the screen



2. The screen is divided into two sections – your FULFILLED REQUESTS and your PENDING REQUESTS.

3. If you have just placed the request it will be sitting at the top of the PENDING REQUESTS section.

4. The file will be listed with its details (FILE NUMBER, TITLE) as well as the intended borrower. Underneath the ACTIONS column you will have the option to DELETE the request

5. Click on the DELETE (garbage bin) button – the Request Profile will appear with all the request details and at the bottom of this screen there will be the option to DELETE or go BACK (if you have clicked on delete by accident)

6. When you are sure that you wish to delete the request. Click on the DELETE Button

7. The following message will appear once the request has been successfully deleted

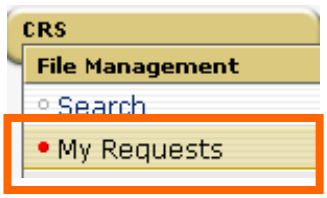
File Request 1681 successfully deleted.

6 Making a request via MY REQUEST

Once you have made a request via CRS it is automatically moved into the MY REQUEST area of the system. Once a request is FULFULLED it remains in the MY REQUEST area under the FULFILLED request section.

If you have a file sitting in your FULFILLED requests section you are able to re-request it from the MY REQUEST area

1 Select MY REQUEST from the menu tree on the left hand side of the screen



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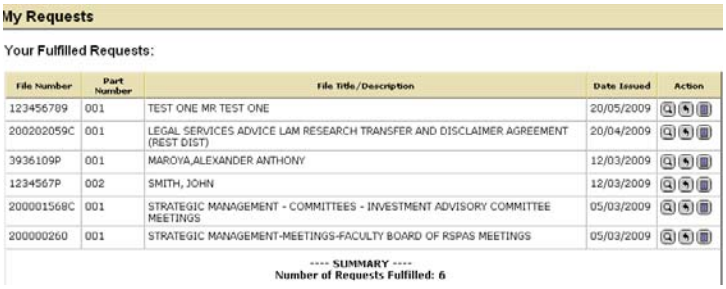
2. The screen is divided into two sections – your FULFILLED REQUESTS and your PENDING request

3. In the FULFILLED REQUESTS section select the file you wish to request



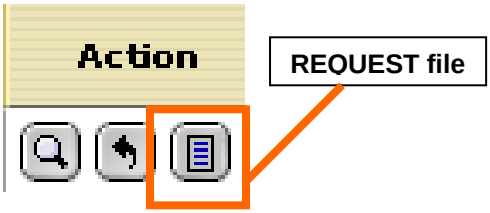
My Requests

Your Fulfilled Requests:

File Number	Part Number	File Title/Description	Date Issued	Action
123456789	001	TEST ONE MR TEST ONE	20/05/2009	
200202059C	001	LEGAL SERVICES ADVICE LAM RESEARCH TRANSFER AND DISCLAIMER AGREEMENT (REST DIST)	20/04/2009	
3936109P	001	MAROYA,ALEXANDER ANTHONY	12/03/2009	
1234567P	002	SMITH, JOHN	12/03/2009	
200001568C	001	STRATEGIC MANAGEMENT - COMMITTEES - INVESTMENT ADVISORY COMMITTEE MEETINGS	05/03/2009	
200000260	001	STRATEGIC MANAGEMENT-MEETINGS-FACULTY BOARD OF RSPAS MEETINGS	05/03/2009	

---- SUMMARY ----
Number of Requests Fulfilled: 6

4. Under the ACTIONS menu (if the file is not currently located with a person) – select the REQUEST BUTTON



5. The Standard request form will appear and you can complete as you normally would if you're requesting the file for yourself or for someone else.

TIP – When Requesting a file either via the SEARCH results view or the MY REQUEST function if there is an arrow button

it means that the file is currently located with a PERSON and you will need to negotiate and arrange the transfer of the file directly to you from that person.

If you request the file you will get the following message:

NOTE: File is currently ISSUED

You may request this file for a future date.